

WhatsApp Business Platform for vtenext (WASB)

- [Introduction and Requirements](#)
- [Installing the Plugin on WASB](#)
- [Installing the Plugin on VTENEXT](#)
- [Configuring the Plugin on VTENEXT](#)
- [Ticket Module Functionality](#)
- [WASB Conversations Module](#)
- [Available SDK Functions](#)
- [vtenext Processes](#)

Introduction and Requirements

Introduction

The WASB plugin for VTENEXT integrates the WhatsApp Business Platform (WASB) with VTENEXT, enabling direct interaction with customers, contacts, and leads through the WhatsApp channel while complying with Meta's regulations.

This integration allows for:

- Initiating and receiving conversations directly in VTENEXT.
- Synchronizing responses in real-time.
- Automatically opening a ticket for each received conversation.
- Bi-directional synchronization of contact records between WASB and VTENEXT

Regarding costs, the plugin follows the commercial rules applicable to VTENEXT standard plugins

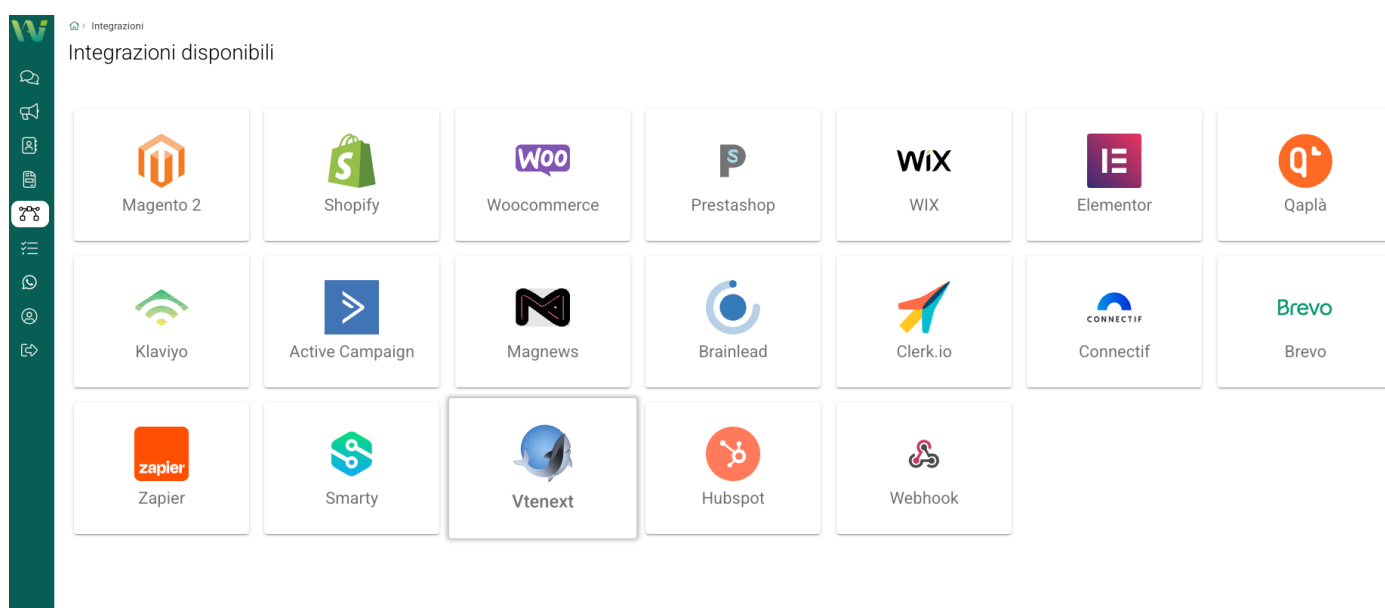
Requirements

For the plugin to function correctly, the contact's mobile number must be entered in the designated field in the VTENEXT records and must be unique to avoid association errors.

Installing the Plugin on WASB

The VTENEXT plugin is already available within the system configurations of WASB and requires:

- CRM URL
- Default CRM user for synchronization
- User API Key



Integrazioni > VteNext

← Configurazione VteNext

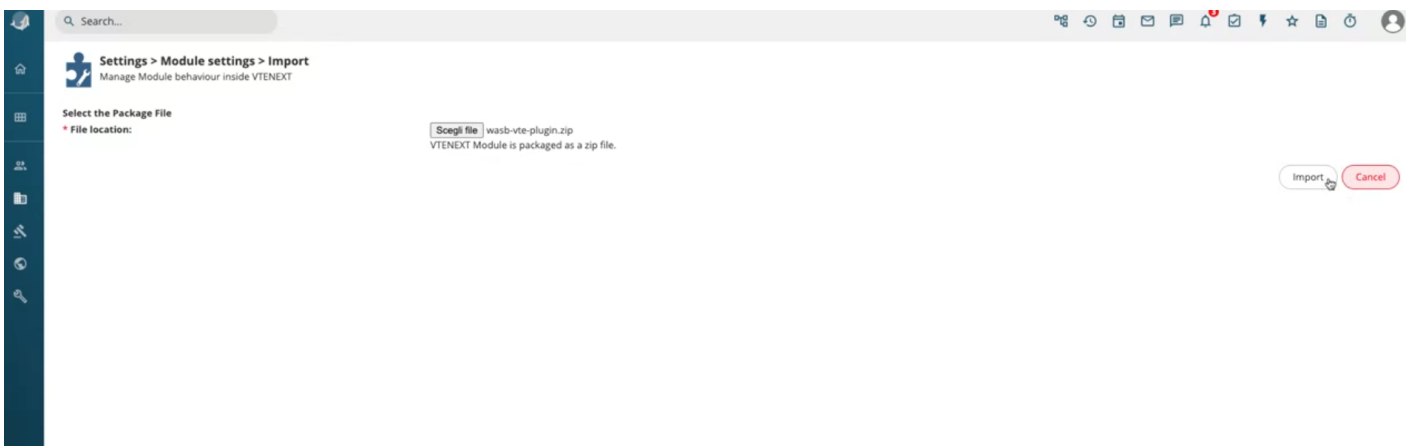
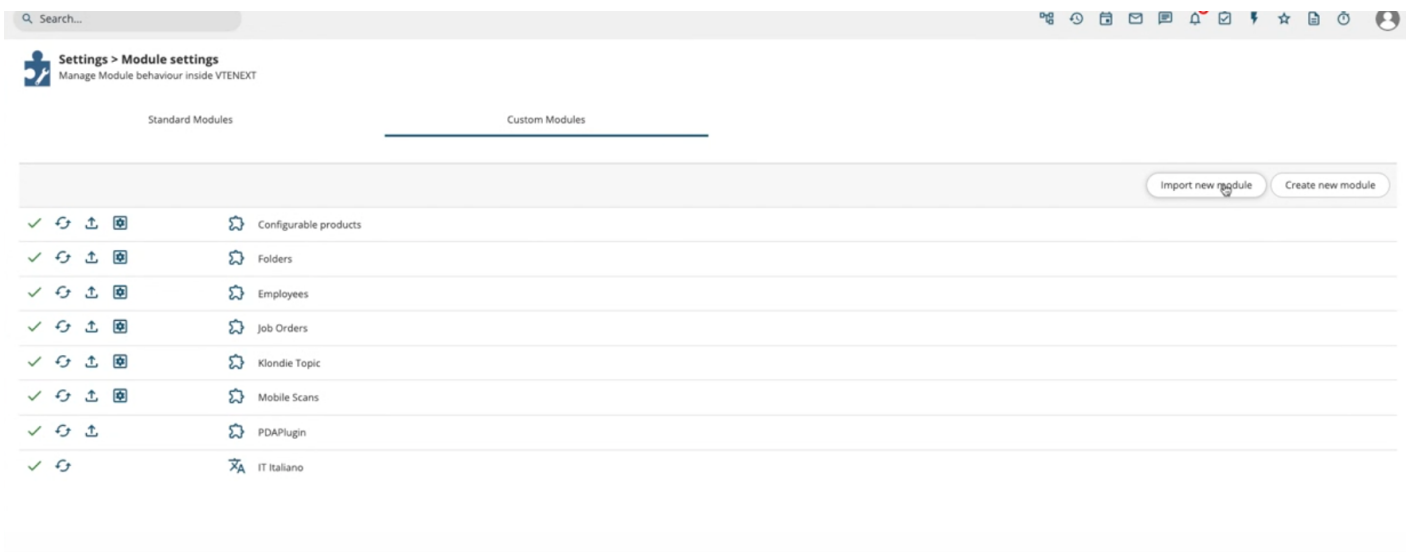
SALVA Annulla

DATI GENERALI ACCESSI

URL	<input type="text" value="https://URL CRM"/>
Username	<input type="text" value="utente vte"/>
API key	<input type="text" value="apikey utente vte"/>

Installing the Plugin on VTENEXT

1. Upload the received ZIP file in **Settings > Module Management**.
2. Select the file from your device.
3. Confirm the import process.
4. Once completed, click **Finish**.
5. Two new modules will be installed: **WASB Template and WASB Conversations**.



Settings > Module settings > Import

Manage Module behaviour inside VTENEXT

Importing Module ...

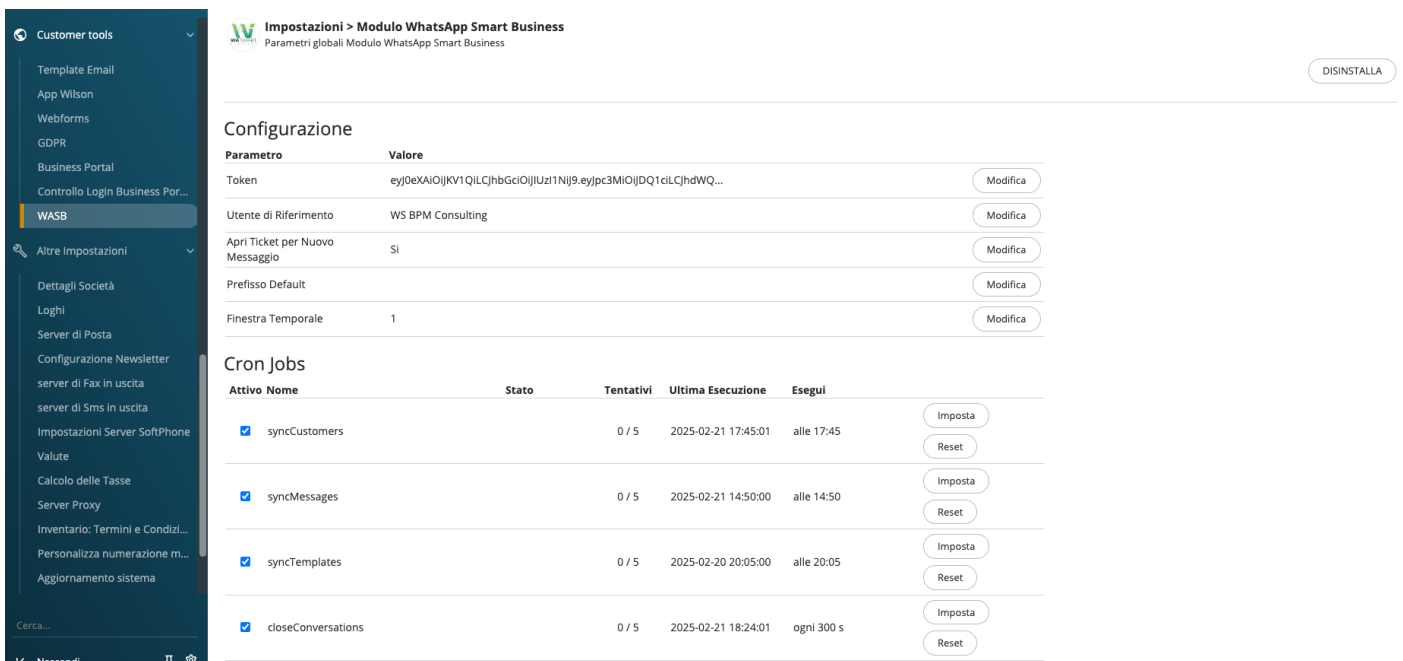
Creating Module WasbConversazioni ... STARTED
Initializing module permissions ... DONE
Initializing customer profiles ... DONE
Updating tabdata file ... DONE
Setting up sharing access options ... DONE
Creating Module WasbConversazioni ... DONE
Added to menu Tools ... DONE
Updating parent_tabdata file ... STARTED
Updating parent_tabdata file ... DONE
SQL:
... DONE
SQL:
... DONE
Creating Panel LBL_TAB_MAIN ... DONE
Creating Block LBL_WASBCONVERSAZIONI_INFORMATION ... DONE
Module language entry for LBL_WASBCONVERSAZIONI_INFORMATION ... CHECK
Creating Field wasb_cnv_name ... DONE
Module language mapping for Nome ... CHECK
Setting entity identifier ... DONE
Creating Field assigned_user_id ... DONE
Module language mapping for Assigned To ... CHECK
Creating Field createdtime ... DONE
Module language mapping for Created Time ... CHECK
Creating Field modifiedtime ... DONE
Module language mapping for Modified Time ... CHECK
Creating Field wasb_cnv_nr ... DONE
Module language mapping for Nr ... CHECK
Creating Field wasb_cnv_anagraid ... DONE
Module language mapping for Anagrafica ... CHECK
Setting wasb_cnv_anagraid relation with Accounts ... DONE
Setting wasb_cnv_anagraid relation with Contacts ... DONE

Initializing customer profiles ... DONE
Setting relation with WasbConversazioni [ADD] ... DONE
Invoking vtlb_handler for module.postinstall ... DONE

Configuring the Plugin on VTENEXT

In the **Admin Settings Panel**, a dedicated section will be available with the following parameters:

- **WASB Token:** Provided by BPMConsulting, necessary for synchronization.
- **VTENEXT reference user:** The same user used in the WASB plugin.
- **Automatic Ticket Creation:** If enabled, a ticket is opened for each received conversation. If a ticket is already open for the same user, the conversation is linked to it.
- **Default Prefix:** Allows setting "+" or "00" as the international prefix for received phone numbers.
- **Time Window:** Defines the time frame (in days) for synchronizing contacts and messages based on the last modification date.
- **Cron Jobs:** Allows setting synchronization frequency for:
 - Automatic retrieval of contacts, messages, and templates from WASB.
 - Automatic closure of conversations after 24 hours of creation (as per Meta's billing model).



Customer tools

- Template Email
- App Wilson
- Webforms
- GDPR
- Business Portal
- Controllo Login Business Por...
- WASB**
- Altre Impostazioni
- Dettagli Società
- Loghi
- Server di Posta
- Configurazione Newsletter
- server di Fax in uscita
- server di Sms in uscita
- Impostazioni Server SoftPhone
- Valute
- Calcolo delle Tasse
- Server Proxy
- Inventario: Termini e Condizi...
- Personalizza numerazione m...
- Aggiornamento sistema

Impostazioni > Modulo WhatsApp Smart Business
Parametri globali Modulo WhatsApp Smart Business

DISINSTALLA

Configurazione

Parametro	Valore	
Token	eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpc3MI0iOjDQ1c1LCJhdWQ...	Modifica
Utente di Riferimento	WS BPM Consulting	Modifica
Apri Ticket per Nuovo Messaggio	SI	Modifica
Prefisso Default		Modifica
Finestra Temporale	1	Modifica

Cron Jobs

Attivo	Nome	Stato	Tentativi	Ultima Esecuzione	Esegui	
<input checked="" type="checkbox"/>	syncCustomers		0 / 5	2025-02-21 17:45:01	alle 17:45	Imposta Reset
<input checked="" type="checkbox"/>	syncMessages		0 / 5	2025-02-21 14:50:00	alle 14:50	Imposta Reset
<input checked="" type="checkbox"/>	syncTemplates		0 / 5	2025-02-20 20:05:00	alle 20:05	Imposta Reset
<input checked="" type="checkbox"/>	closeConversations		0 / 5	2025-02-21 18:24:01	ogni 300 s	Imposta Reset

Ticket Module Functionality

If the **automatic ticket creation** function is enabled, when a customer sends a message through WASB:

1. If the number is not already in the records, a new lead is created.
2. The conversation is associated with the contact record.
3. A ticket related to the conversation is opened.

The screenshot displays the Ticket Module interface for a specific ticket. The top navigation bar includes a back arrow, the ticket ID 'Ticket 2025-02-27 22:21:33 - +393351032246', a 'Modifica' button, and several utility icons. Below the navigation bar are tabs for 'INFORMAZIONI', 'GRAFICO PROCESSO', 'STORICO PROCESSO', and 'STORICO'. The main content area is divided into two sections: 'Informazioni Ticket' and 'Informazioni Descrittive'. The 'Informazioni Ticket' section contains fields for Title, Assignee, Priority, Importance, Creation Time, Days, Ticket Number, Operation, and Creator. The 'Informazioni Descrittive' section contains a Description field with a timestamp and a status indicator. A right-hand sidebar shows a 'SCORCIOIE' section with 'Commenti', 'Conversazioni', and 'Note', and a 'RELAZIONI' section with 'WASB Conversazioni', 'Attività', 'Documenti', 'Servizi', 'Interventi', 'Installazioni', 'Servizi a Contratto', 'Messaggi', and 'Processi'.

Informazioni Ticket	
Titolo	Collegato a
2025-02-27 22:21:33 - +393351032246	Daniele
Assegnato a	Nome Prodotto
ws.admin (WS BPM Consulting)	
Priorità	Stato
Alto	Aperto
Importanza	Ore
	0.00
Orario creazione	Categoria
27-02-2025 22:21:34	
Giorni	Orario modifica
0.00	27-02-2025 22:21:44
Nr. Ticket	Pianificazione
TT24	
Operazione	Regola Mail Converter
Creatore	
ws.admin (WS BPM Consulting)	

Informazioni Descrittive	
Descrizione	
2025-02-27 22:21:33	
Buongiorno, vorrei contattarvi	
2025-02-27 22:21:43	
SI ✓	

Conversations follow the same logic as tickets from the **Customer Portal**:

- The first message is saved in the **Description** field.
- Subsequent messages are recorded in the **Comments**.
- Statuses follow the **Waiting for response / Customer responded** logic.

← Ticket 2025-02-27 22:21:33 - +393351032246 Modifica

Descrizione
2025-02-27 22:21:33
Buongiorno, vorrei contattarvi
2025-02-27 22:21:43
SI ✓

Commenti Richiedi informazioni confidenziali

Aggiungi un commento... Invia

WS BPM Consulting
Daniele Daniele ha scritto:
Benissimo grazie
#2 3 secondi fa

Daniele Asmonti
grazie oggi la chiamiamo
#1 20 secondi fa

SCORCIATOIE
Commenti 2
Conversazioni
Note

RELAZIONI
Processi 1
WASB Conversazioni 1
Attività
Documenti
Servizi
Interventi
Installazioni
Servizi a Contratto
Messaggi

If a conversation exceeds **24 hours**, the response must be sent using a **Meta-approved template**.

WASB Conversations Module

The WASB Conversations module is:

- Integratable into VTENEXT workflows.
- Relatable to any native or custom module in VTENEXT.
- Synchronizable with the WASB address book via processes and SDK functions.

The screenshot displays the WASB Conversations Module interface. At the top, there is a navigation bar with tabs for 'INFORMAZIONI', 'TEMPLATE', 'GRAFICO PROCESSO', 'STORICO PROCESSO', and 'STORICO'. The main content area is divided into two sections: 'Informazioni WASB Conversazione' and 'Dettaglio Conversazione'.

Informazioni WASB Conversazione

Nome	Assegnato a
2025-02-18 11:37:49 - 393351032246	ws.admin (WS BPM Consulting)
Orario creazione	Orario modifica
18-02-2025 11:37:49	19-02-2025 11:41:01
Nr	Anagrafica
	ASMONTI Daniele
Relazionato a	Stato
2025-02-18 11:37:49 - 393351032246	Chiusa
Data e Ora Avvio Conversazione	Template di Partenza
2025-02-18 11:37:49	
Stato Ultimo Messaggio	

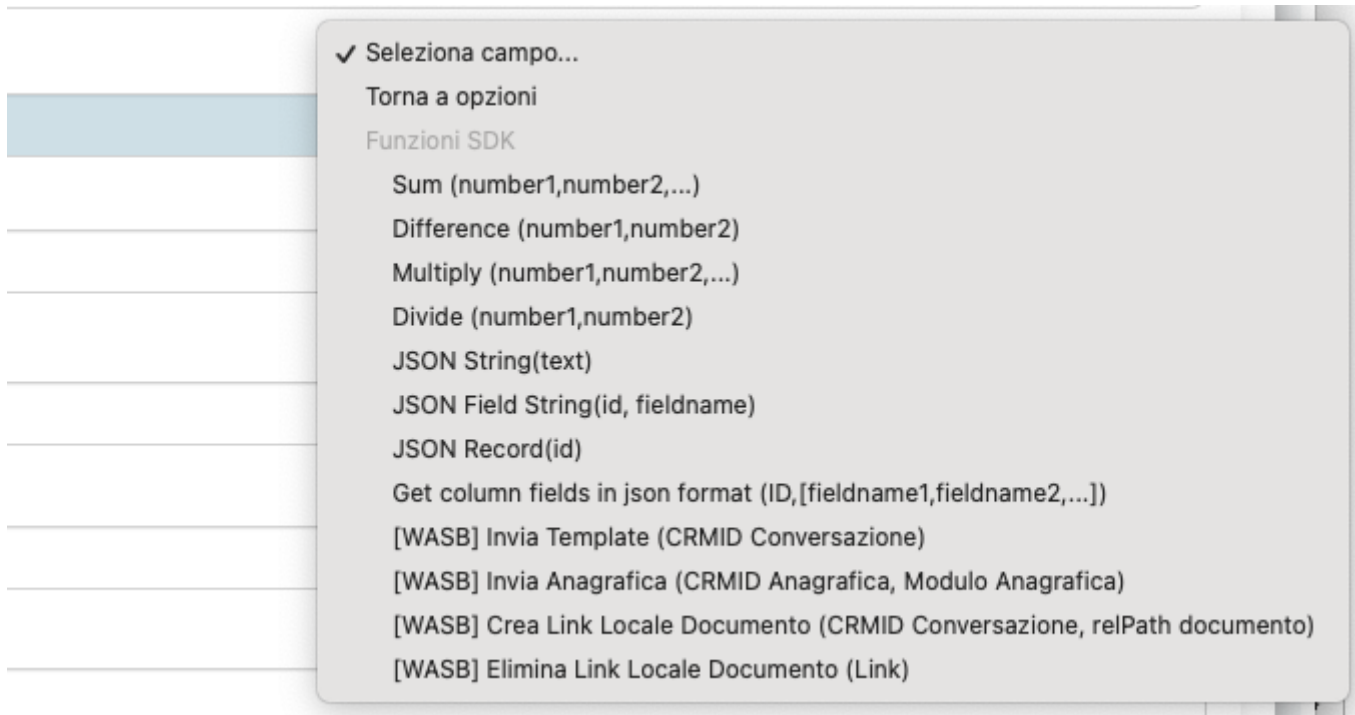
Dettaglio Conversazione

Conversazione	Stato	Data e Ora	Messaggio Cliente	Messaggio Amministrazione
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgUM0E2NTUyMUyWYWRUZFNOE2NKU1MUYA	received	2025-02-18 11:37:49	Buongiorno, ci possiamo sentire ?	
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgSNDhFN0E5ODIFMkVMDAaZQ0iOAA==	read	2025-02-18 11:38:26		Certo la contattiamo alle 12.00
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgUM0F0cQjC0QklwNOY5MDE2Nzg1MTcA	received	2025-02-18 11:39:13	perfetto grazie mille	
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgUM0FERjRjFFMUyQyODMwNzQyRjJlNCQzKA	received	2025-02-18 12:14:10	quando volete ci sono	
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgSOEMyNzFENDkzMTVEQOMxRERDAA==	read	2025-02-18 12:20:16		la chiamo subito
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgSMjM0MTg0NElzMTcyNjNFQkQxAA==	read	2025-02-18 12:27:21		provo un nuovo commento
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgUM0E1RkE0MKU4QjNBNTBFQVBMKEA	received	2025-02-18 12:27:31	è arrivato	
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgUM0FGNkYyRTFFMjE0RTUyMjY5MEYA	received	2025-02-18 12:30:40	poco fa	
wamid.HBgMMzKzZUxMDMyMjQ2FQIAEhgSMDY3QTVGQ0NCRTFF0EzENj1AA==	read	2025-02-18 12:31:10		confermo

On the right side, there is a sidebar with a search bar and a list of 'RELAZIONI' (Relations) including 'Processi', 'Messaggi', 'Documenti', and 'Attività'. The 'Processi' item has a notification badge with the number '2'.

Available SDK Functions

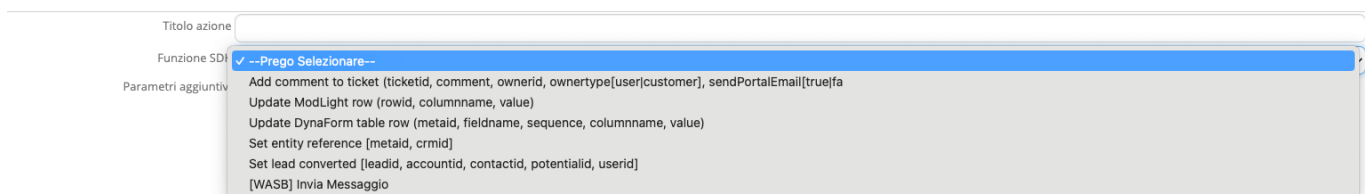
The package automatically installs **four Field Actions** (identified by the WASB prefix):



- **Send Template:** Allows sending a message via the WASB Conversations module using a WASB Template (approved by Meta).
- **Send Contact Record:** Enables the creation of a contact record from VTENEXT to WASB (specifying the VTENEXT source as Lead, Contact, or Company).
- **Create Local Document Link:** Used when sending messages with an attachment. This function temporarily copies a VTENEXT document to a public folder via URL, making it accessible for WhatsApp, then deletes it afterward (WhatsApp imports the document into its local storage, so keeping the document public is unnecessary).

SDK Action for Sending Messages to WASB: Automatically checks for new unsynchronized rows in the table field within the WASB Conversations module and sends them immediately.

Azione: Funzione SDK



vtenext Processes

Three complete VTENEXT processes are available on www.bpmconsulting.it, associated with the following modules:

1. **Ticket Management Process - TICKET MODULE**

Automatically sends a comment through the WASB channel.

Checks if an active conversation is linked to the ticket; otherwise, it uses the associated Utility Template to send a message to the customer.

2. **Message Sending from WASB Conversation - WASB CONVERSATIONS MODULE**

Sends a message within an existing conversation.

3. **Contact Record Creation Process - CONTACTS MODULE**

Sends contact record data directly to WASB.